Infinity Globus
a springline company

R&D CREDIT SERVICES

Structured identification, calculation, and substantiation of Research & Development (R&D) tax credits designed to enhance tax advisory capabilities while maintaining full compliance integrity.



Core R&D Credit Service Categories

Eligibility & Qualification Analysis

- Business activity assessment
- Qualified research activity identification
- Industry-specific eligibility review
- Nexus between technical activities and tax regulations

Credit Calculation & Quantification

- Qualified research expense (QRE) analysis
- Wage, supply, and contractor cost identification
- Alternative simplified credit (ASC) calculations
- Federal and state R&D credit computation

Documentation & Compliance Support

- Technical narratives and project descriptions
- Contemporaneous documentation support
- Audit-ready substantiation files
- IRS and state compliance alignment
- Form 6765 preparation support (Credit for Increasing Research Activities)
- State R&D credit form preparation support and reconciliation schedules

Audit & Controversy Support

- IRS audit defense assistance
- Notice response drafting
- Technical and financial support during examinations

Engagement Models

MODEL 1

Dedicated Support (FTE Model)

- Ongoing R&D credit identification & monitoring
- Continuous documentation support
- Fixed monthly fee structure
- Suitable for innovation-driven and growth-stage companies

MODEL 2

Project-Based Engagement

- Year-end R&D credit study
- Defined scope and deliverables
- Fixed fee per study or tax year
- Ideal for one-time claims or amended filings

MODEL 3

Hourly Model

- Advisory consultations
- Technical eligibility reviews
- Audit defense and IRS response support
- Billed based on hours consumed

Value Proposition

Maximum Credit Optimization
Comprehensive identification of eligible activities and expenses to ensure no qualifying credits are missed.

Audit-Defensible Documentation
Structured technical narratives and financial workpapers aligned with IRS guidelines.

Industry-Specific Expertise
Experience across technology, manufacturing, life sciences, engineering, and innovation-focused sectors.

Cash Flow Enhancement
Strategic utilization of credits to reduce tax liability and improve liquidity.

Regulatory Alignment
Methodologies aligned with federal and state R&D tax regulations.

Scalable Support Model
Flexible engagement structures suited for startups, mid-market companies, and large enterprises

Scope Overview

Technical Activity Review

- Project interviews and documentation review
- Activity qualification under Section 41 guidelines
- Process and experimentation analysis

Credit Computation & Reporting

- Federal and state credit calculations
- Amended return support (if required)
- Coordination with tax filing teams

Financial Data Analysis

- QRE extraction and cost categorization
- Wage allocation analysis
- Contractor and supply cost evaluation

Audit & Ongoing Support

- IRS examination support
- Documentation maintenance
- Future-year credit planning



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